



HR352
**Cardinal Employee Data Setup
and Maintenance Benefits Only**

Instructor Led Training



Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

The following HCM training materials are located on the Cardinal website (www.cardinalproject.virginia.gov) under training:

- Job Aids on topics across all functional areas
- Functional process and instructional videos

The Cardinal HCM Reports Catalog is located on the Cardinal website under Resources.

This course and all other Cardinal HCM training courses are available on the Cardinal Training Management System.




The system screenshots included in the Cardinal HCM training courses show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

- For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



Course Objectives

After completing this course, you will be able to:

-  Explain how the Cardinal HCM functional areas work
-  Hire an employee online (Personal and Job Data)
-  Enter job data updates (Leave of Absence, Termination)



Agenda

1

Overview of Cardinal HCM

2

Key HCM Concepts

3

Setup and Maintain Employee HR Data



Lesson

1

Overview of Cardinal HCM

This lesson covers the following topics:

- Cardinal HCM data supports the administration of:
 - Human Resource (HR)
 - Benefits (BN)
- Cardinal Data Entry Methods
- Cardinal Effective Dating



Cardinal HCM Human Resources

The Human Resources (HR) functional area contains all employee HR data related to the employee lifecycle. The business processes and sub-processes that make up the core HR functionality enable agencies to add and update:

- Position data (e.g., job code, department, location)
- Employee personal data (e.g., name, address)
- Employee job data (e.g., employee type)

HR data maintained in the Human Resources functional area feeds into and supports all other HCM functional areas.

The personal data record for an employee working in multiple agencies or HR Offices can be accessed by the applicable agency or locality.

The following HR business processes and sub-processes are part of Cardinal HCM:

- Hire/Rehire Employee
- Enter and Maintain Leave Status
- Separate Employee

This data is utilized by the Benefits module to administer employee benefits.





Cardinal HCM Benefits

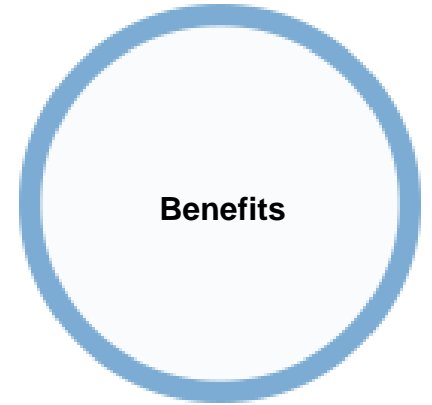
The Benefits Administration (BN) functional area includes all the processes required for maintaining health benefits for the employees of the organization and their dependents.

The Employee Job records from HR are required for employees who will be covered by health benefits.

The following BN business processes and sub-processes are part of Cardinal HCM:

- Administer Open Enrollment
- Administer Event Maintenance
 - Maintain Enrollments
 - System Generated
 - Forms
 - Life Events
 - Qualified Medical Support Court Orders (QMSCO)
- Administer COBRA*
- Benefits Reconciliation
- ACA Reporting

*COBRA letter processing, as well as COBRA enrollment, are administered centrally by the Office of Health Benefits (OHB) triggered by data entered on the Employee Job Record.





Cardinal Data Entry Methods

The chart below outlines the criteria for using the two possible data entry methods.

	Online Entry	Mass Upload*
Data Source	Entered by user	User-populated Excel template loaded by PPS (which includes Job Data and New Hire uploads)
Data Volume	Low to moderate volume	High volume
Frequency	Ad-hoc	Ad-hoc, infrequent
Data Validation	Invokes all online edits and validations	Invokes all online edits and validations
Error Handling	Data errors are addressed during real-time data entry	Rudimentary error reporting by row number only. Errors must be manually keyed into Cardinal or fixed in Excel and reloaded

Note: It is recommended to use the mass upload tool on an infrequent basis because it does not have detailed error reporting capabilities.

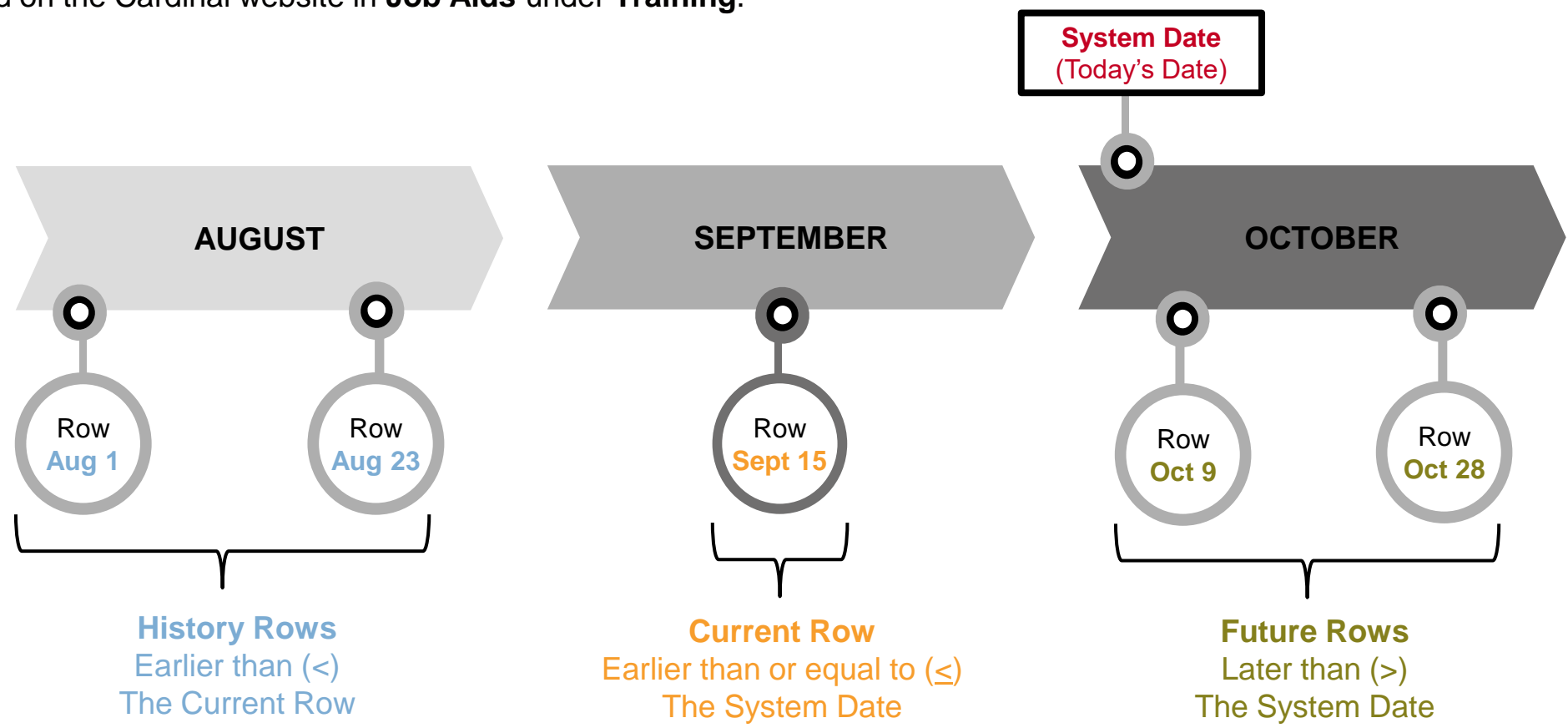


Cardinal Effective Dating

When entering new information related to existing data, such as a leave of absence, retaining the data already in the database is imperative. To retain history, insert a data row identified by a date that indicates when the new information goes into effect: an effective date.

Effective dating provides the ability to keep historical, current, and future-dated information and the ability to update existing information without losing or overwriting the data already in Cardinal.

For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.





Cardinal Effective Dating (continued)

Below is an example of how the Personal Record and the Job Record Effective Dating will impact each other and other functional areas.

The effective date of the hire on the Job Record cannot be prior to the effective date on the Personal data hire record.

The screenshot displays three overlapping HR system windows. The top window, 'Biographical Details', shows 'Effective Date' as 12/10/2020. The middle window, 'Work Location', shows '*Effective Date' as 12/10/2020. The bottom window, 'Benefit Program Participation Details', shows '*Effective Date' as 12/10/2020. All three dates are highlighted with red boxes. The 'Work Location' window also shows 'Empl ID', 'Empl Record 0', 'Effective Sequence 0', 'HR Status Active', '*Action Hire', and 'Reason New Hire'. The 'Benefit Program Participation Details' window shows 'Currency Code USD' and '*Benefit Program SAL'.

Biographical Details | Contact Information | Regional | VA Person Info

Person ID

Name

Effective Date 12/10/2020

Format Type English

Display Name

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Empl ID

Employee Empl Record 0

Work Location Details ?

***Effective Date** 12/10/2020

Effective Sequence 0

HR Status Active

*Action Hire

Reason New Hire

Benefit Program Participation Details ?

***Effective Date** 12/10/2020

Currency Code USD

*Benefit Program SAL

Salaried Employee Benefit Pgm



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. The effective date does not impact anything in the system.
 - a) True
 - b) False



2. When completing a hire, the Personal Data page must be effective dated:
 - A. Prior to the effective date of the Job Record
 - B. Equal to the effective date of the Job Record
 - C. Less than or equal to the effective date of the Job Record



3. The data entered on the Personal and Job Record will NOT be used in determining benefits.
 - A. True
 - B. False



Lesson Summary

1

Overview of Cardinal HCM

In this lesson, you learned:

- Cardinal HCM data supports the administration of:
 - Human Resources (HR)
 - Benefits (BN)
- All records in Cardinal HCM are effective dated and the importance of effective dates



Lesson

2

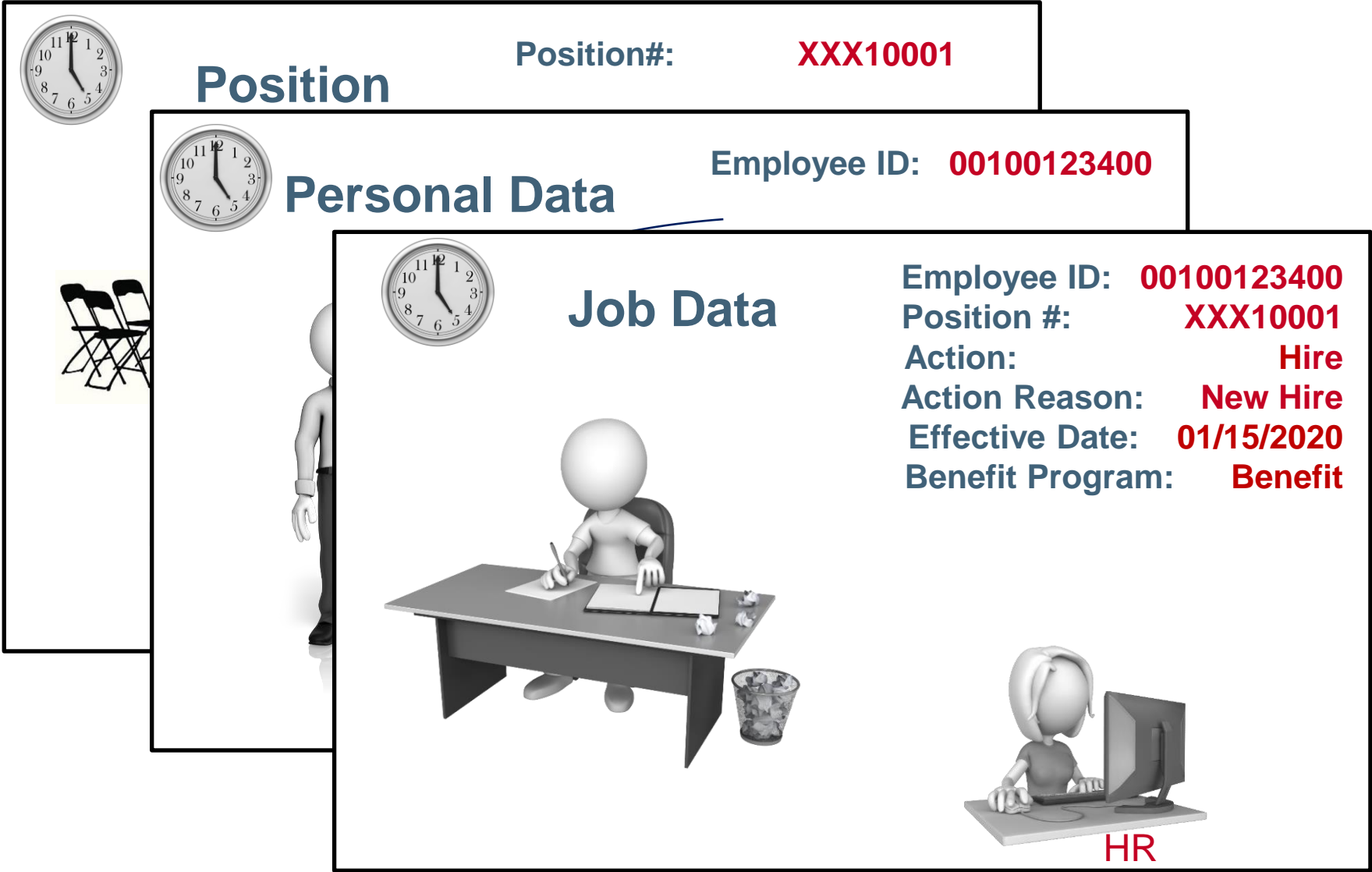
Key HCM Concepts

This lesson covers the following topics:

- HR Data Relationships
 - Position Data
 - Personal Data
 - Employee Job Record



HR Data Relationships Review





HCM Key Concept

① POSITION DATA*

Pooled Position: XXX10001

Pos Descr: Full Time Kaiser
Business Unit: XXXXX

Pooled Position: XXX10002

Pos Descr: Part Time Kaiser
Business Unit: XXXXX

③ JOB DATA*

Empl ID: 00100123400

Empl Rcd: 0
Position: XXX10001
Business Unit**: XXXXX
Benefit Program: XXX
Full Time/Part Time: Full Time

Empl ID: 00100123600

Empl Rcd: 0
Position: XXX10001
Business Unit**: XXXXX
Benefit Program: XXX
Full Time/Part Time: Full Time

Empl ID: 00100123600

Empl Rcd: 1
Position: XXX10002
Business Unit**: XXXXX
Benefit Program: XXX
Full Time/Part Time: Part Time

② PERSONAL DATA*

Empl ID: 00100123400

Name: Jane Doe
Address: 123 Main Street,
Richmond, VA 23222
SSN: 123-45-6789

Empl ID: 00100123600

Name: Mark Thomas
Address: 123 Valley Dr,
Richmond VA 23222
SSN: 345-67-8999

*Fields/data elements listed are only a sample for representative purposes

**Indicates a field on job data that is inherited from position data



Lesson Summary

2

Key HCM Concepts

In this lesson, you learned:

- Health Benefit Only Agencies (HBOs) and Localities will be provided pooled positions
- Employee personal data is required to save the new hire record
- Employee data will be changed on the job record, not on the position
- Core employee data entered on the personal and job data pages is used for administering benefits



Lesson

3

Setup and Maintain Employee HR Data

This lesson covers the following topics:

- Viewing Position Data
- Hiring or Rehiring an Employee
- Maintaining Leave Status
- Separating an Employee



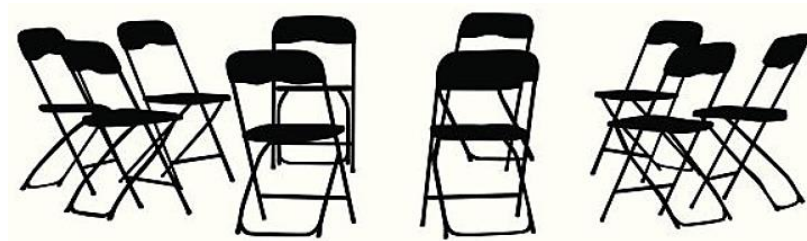
Position Data

Viewing Position Data

- The HR Office has view-only access to pooled positions.
- The HR Office uses a paper form to capture position information changes and routes to DHRM for approval and entry.

Note: Changes to a current position are pushed to all incumbents' job data records.

- DHRM inputs the change(s) in Cardinal after the approval process completes.





Position Data (continued)

Position Number A010000F		
Headcount Status Overallocated		
Current Head Count 59 of 50		
<hr/>		
Effective Date 12/29/2020	Review Date	
Effective Sequence 0	Position Months 12.00	
Reason UPD Position Data Update	Stmt of Economic Interest Req'd No	
Approval Status Approved	VPA Covered No	
<hr/>		
Position Information		
<hr/>		
Position Status Approved	Max Head Count 50	
Status Active	Status Date 01/01/1901	
Action Date 12/29/2020	SOC Code / Extension	
Key Position No	Job Sharing Permitted No	
Budgeted Position Yes	Available for Telework No	
Confidential Position No	EEO-4 Job Category No EEO-4 Reporting	
Alternate Work Schedule No	Workers' Comp Code 8810	
<hr/>		
Job Information		
<hr/>		
Business Unit LOCAL	The Local Choice Participants	Manager Level All Other Positions
Job Code COVA99	COV Default	Full/Part Time Full-Time
Regular/Temporary Regular	Union Code	

Navigation: Navigator > Organizational Development > Position Management > Maintain Position Budgets > Manage Position



DEMO



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. The HR Office will have the ability to:
 - a) Create/Update Position information
 - b) Create/Update Personal and Job Data
 - c) Delete Positions



2. The Job Record does not require an effective date.
 - a) True
 - b) False



Hiring or Rehiring an Employee

Personal Data Information

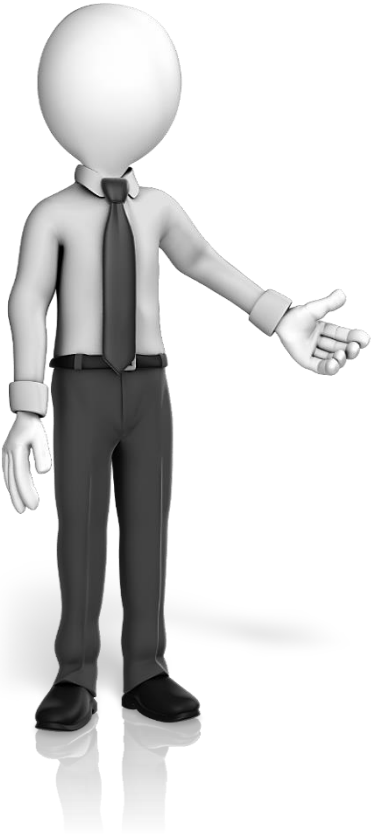
If a new hire does not have a SSN, (e.g., Foreign Nationals), the employee must submit an SS-5 Application for a Social Security card to the Social Security Administration. A temporary number can be assigned until the permanent number is received. The “Employee Temporary Number Request” form must be completed and submitted to DHRM. This process is the same as it happens today.

The query RHR187 - Query to Monitor Temporary SSNs monitors temporary SSNs existing in the Cardinal system. For further information on monitoring temporary SSNs, see the Job Aid titled **HR351 Monitoring Temporary SSN**. This job aid can be found on the Cardinal website in **Job Aids** under **Training**.

Prior to completing the new hire or rehire, the HR Office conducts an Employee Search Match in Cardinal to identify if the person already exists in the Cardinal system.

- If a match is not found, PMIS assigns a new employee ID. For more information on assigning Employee IDs, see the Job Aid titled **Release 1 Assigning Empl ID**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.
- If a match is found (SSN and Name in system must match new entry), the HR Office updates the applicable employee job data record.

For further information on hiring an employee, see the Job Aid titled **HR352 Hiring an Employee**. This job aid can be found on the Cardinal website in **Job Aids** under **Training**.





New Window | Help | Personalize Page

Add a Person

Search Criteria

Search Criteria

Search Results

Person Organizational Summary

Person ID

Employment Instances

ORG Instance 0Last Hire 06/10/2020Termination Date 06/10/2020HR Status InactivePayroll Status Terminated

Assignments

Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date	Job Code	Grade	Benefits Status
0	Inactive	Terminated	06/11/2020	71800	06/10/2020	Classified Salary	06/10/2020	91512	6	Active

Return to Search

Notify

10NID Only

Selective Search



Hiring or Rehiring an Employee (continued)

If an existing Employee ID is not found during the Employee Search Match, submit a request for a new Employee ID to OHB. The HR Office navigates to the **Add a Person** page and inputs the PMIS Employee ID number received from OHB into the **Person ID** field.

A screenshot of a web application window titled "Add a Person". In the top right corner, there are links for "New Window", "Help", and "Personalize Page". The main content area has the heading "Add a Person". Below this, there is a form with a label "Person ID" and a text input field containing the word "NEW". The input field is highlighted with a red rectangular border. Below the input field is a green button labeled "Add Person". At the bottom of the form area, there is a blue link that says "Search for Matching Persons".

Note: This process applies to Release 1 Agencies **ONLY**. Cardinal will automatically assign all Empl IDs after Release 2.



Hiring or Rehiring an Employee (continued)

New Window | Help | Personalize Page

Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info

Person ID NEW

Name

1 of 1

View All

*Effective Date

*Format Type

Display Name

English Name Format

Name Prefix

*First Name

Middle Name

*Last Name

Name Suffix

Display Name

Formal Name

Name

OK Cancel Refresh Name

Biographic Information

Date of Birth

Birth Country

Birth State

Birth Location



Hiring or Rehiring an Employee (continued)

[New Window](#) | [Help](#) | [Personalize Page](#)

Biographical Details | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)

Person ID NEW

Name Q | ◀ ▶ 1 of 1 ▼ ▶ | [View All](#)

*Effective Date 01/01/2021 📅 + -

*Format Type English ▼

Display Name 📄 [Edit Name](#)

Biographic Information

Date of Birth 📅 Years 0 Months 0

Birth Country USA 🔍 United States

Birth State 🔍

Birth Location ☐ Exclude Contact Information?



Hiring or Rehiring an Employee (continued)

Biographical History

1 of 1

View All

*Effective Date01/01/2021

*GenderUnknown

*Highest Education LevelNot Indicated

*Marital StatusUnknown

Language Code

Alternate ID

As of

Full-Time Student

+

-

National ID

1-1 of 1

View All

*Country	*National ID Type	National ID	Primary ID		
USA	Social Security Number		<input checked="" type="checkbox"/>	<div><div>+</div><div>-</div></div>	

Save

Notify

Refresh

Add

Update/Display

Include History

Biographical Details | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)



Hiring or Rehiring an Employee (continued)

New Window | Help | Personalize Page

Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info

New Window | Help | Personalize Page

Address History

New Window | Help | Personalize Page

Current Address

Address Type Address

Home 0

Phone Information

*Phone Type

OK

Edit Address

Country United States

Address 1

Address 2

Address 3

City State

Postal

County

OK Cancel

Note: The state selected as part of the address will have a direct impact on benefit options.



Hiring or Rehiring an Employee (continued)

Cardinal HCM leverages the Virginia Information Technologies Agency’s (VITA) cloud-based Identify Access Management tool, Okta, to authenticate agency users. This tool requires a valid email address to complete the authentication process. To ensure all employees (active and inactive) can always access Cardinal, Cardinal HCM requires a preferred email address.

The HR Office selects the appropriate **Email Option** radio button.

The HR Office then selects the Email Type (Business or Personal), enters the email address in the **Email Address** field, and selects the **Preferred** checkbox.

Phone Information

1-1 of 1

View All

*Phone Type	Telephone	Extension	Preferred		
<div>Business</div>	<div>555/555-5555</div>	<div></div>	<div></div>	<div>+</div>	<div>-</div>

Email Option Selection

Agency Provided Email

Pending Agency Provided Email

Employee Provided Email

Email Addresses

*Email Type	*Email Address	Preferred		
<div></div>	<div></div>	<div></div>	<div>+</div>	<div>-</div>

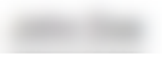


Hiring or Rehiring an Employee (continued)

- Select the **Employee** checkbox
- Verify **Hire** auto-populates in the **Select Checklist Code** field
- Click the **Add Relationship** button

[New Window](#) | [Help](#) | [Personalize Page](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | **Organizational Relationships** | [VA Person Info](#)



 **Person ID** NEW

Choose Org Relationship to Add

☐ **Employee**

☐ Contingent Worker

☐ Person of Interest

Select Checklist Code  

Add Relationship

Save | **Notify** | **Refresh**

Add | **Update/Display** | **Include History**

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)



Hiring or Rehiring an Employee (continued)

Job Data Information

When entering job details for the new hire or rehire, the effective date represents the hire or rehire date and must be greater than or equal to the effective date of the Personal Data entered. Future-dated effective dates can be added to the system for future-dated hires, if applicable.

Select the appropriate Action/Action Reason that best describes the hire/rehire reason. For further information on valid Action/Action Reason combinations, see the Job Aid titled **HR352 Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.

The selected **Action/Action Reason** field drive automatic updates to HR, Payroll, and Benefit statuses.

The shared position data automatically populates on the employee's **Job Data** page after the **Position Number** field is entered/selected.

Additional job data information, (e.g., employee class – TLC EE) is entered on the **Job Data** page.

Employees holding multiple concurrent jobs have a single Employee ID, but multiple employee job records. The Primary Job Indicator (located on the **Job Data** page) drives benefits administration.

For further information on hiring an employee, see the Job Aid titled **HR352 Hiring an Employee**. This job aid can be found on the Cardinal website in **Job Aids** under **Training**.





Hiring or Rehiring an Employee (continued)

Job Data – Work Location

[New Window](#) | [Help](#) | [Personalize Page](#)

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Employee [REDACTED] Empl ID [REDACTED]
Empl Record 0

Work Location Details ? 1 of 1

*Effective Date 01/25/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

*Action Hire

Reason New Hire

*Job Indicator Primary Job

[Go To Row](#) [+](#) [-](#)

[Calculate Status and Dates](#)

Position Number A01000F TLC 047001000 Full Time Pos

[Override Position Data](#)

Position Entry Date 01/25/2021 ☐ Position Management Record

Regulatory Region USA United States

Company A01 Lee County - DSS

Business Unit LOCAL The Local Choice Participants

Department 047001000 Lee County - DSS

Department Entry Date 01/25/2021

Location OHB DHRM Office of Health Benefits

Establishment ID LOCAL Localities

Date Created 01/29/2021

For further information on Action/Action Reasons, see the Job Aid titled **HR352 Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.



Hiring or Rehiring an Employee (continued)

Job Data Information – Job Information

[New Window](#) | [Help](#) | [Personalize Page](#)

[Work Location](#) | **[Job Information](#)** | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Employee

Empl ID

Empl Record 0

Job Information Details ?

1 of 1

Effective Date01/25/2021

Effective Sequence0

HR StatusActive

Payroll StatusActive

ActionHire

ReasonNew Hire

Job IndicatorPrimary Job

Go To Row

Job CodeCOVA99

Entry Date01/25/2021

Supervisor LevelE

Reports To400HR102

Regular/TemporaryRegular

Empl ClassTLC EE

Regular ShiftNot Applicable

Classified IndClassified

COV Default

Employee

Security Assistant (2)

Full/PartFull-Time

*Officer CodeNone

Shift Rate

Shift Factor

SOC Code

Supervisor Name

Current



Hiring or Rehiring an Employee (continued)

Job Data Information – Payroll

[New Window](#) | [Help](#) | [Personalize Page](#)

Work Location

Job Information

Job Labor

Payroll

Salary Plan

Compensation

Employee Empl ID Empl Record 0

Payroll Information ?

Effective Date 01/25/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

Go To Row

Current

*Payroll System Payroll for North America

Absence System Other

Payroll for North America ?

Pay Group MNP Non-Payroll

Employee Type S Salaried

Tax Location Code 087 Henrico

GL Pay Type

Combination Code

Holiday Schedule NOHOL LOCALITY

FICA Status Exempt

Edit ChartFields



Hiring or Rehiring an Employee (continued)

Job Data Information – Salary Plan

New Window | Help | Personalize Page

Work Location | Job Information | Job Labor | Payroll | **Salary Plan** | Compensation

Employee

Empl ID

Empl Record 0

Salary Plan Details ?

Effective Date 01/25/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

Go To Row

Current

Salary Admin Plan UG

Grade

Step

Ungraded

Grade Entry Date

Step Entry Date

☐ Includes Wage Progression Rule

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

OK | Cancel | Apply

Refresh

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation



Hiring or Rehiring an Employee (continued)

Job Data Information – Compensation

Work Location

Job Information

Job Labor

Payroll

Salary Plan

Compensation

Empl ID

Empl Record 0

Employee

Empl Record 0

Compensation Details

1 of 1

Effective Date 01/25/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

Go To Row

Current

Compensation Rate 0.000000

*Frequency Annual

Comparative Information

Pay Rates

Annual USD

Daily USD

Monthly USD

Hourly USD

Default Pay Components

Pay Components

1-1 of 1

Amounts

Controls

Changes

Conversion

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1 NAANNL	0		USD	A		+	-

Calculate Compensation

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

OK

Cancel

Apply

Work Location

Job Information

Job Labor

Payroll

Salary Plan

Compensation



Hiring or Rehiring an Employee (continued)

Job Data Information - Employment Information

Employment Information

New Window | Help | Personalize Page

Empl ID

Empl Record 0

Employee

Organizational Instance ?

Organizational Instance Rcd 0

Original Start Date 01/25/2021

Override

Last Start Date 01/25/2021

First Start Date 01/25/2021

Termination Date

Org Instance Service Date 01/25/2021

Override

Years 0

Months 0

Days 4

Organizational Assignment Data ?

Instance Record

Last Assignment Start Date 01/25/2021

First Assignment Start 01/25/2021

Assignment End Date

Home/Host Classification Home

Company Seniority Date 01/25/2021

Benefits Service Date 01/25/2021

Seniority Pay Calc Date 01/25/2021

Probation Date

Professional Experience Date

Business Title TLC 047001000 Full Time Pos

Position Phone

Work Mode Office/Facility Worker

Tenure Status/Contract Type

Alternate Leave Plan

Alternate Work Schedule

VSDP Effective Date

Agency Use Field 1

Agency Use Field 2

Agency Use Field 3

Time Reporter Data

Years 0

Months 0

Days 4

Years 0

Months 0

Days 4

Years 0

Months 0

Days 4

Person Employment Dates ?

Continuous State Service Date

Leave Eligibility Service Date

Previous Months Of Service

USA

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

Save

Return to Search

Notify

Refresh

Update/Display

Include History

Note: The Continuous State Service Date, Leave Eligibility Service Date, and Previous Months of Service are tracked in the Agency's system of record, not Cardinal.



Hiring or Rehiring an Employee (continued)

Job Data Information – Benefits Program Participation

Benefit Program Participation

New Window | Help | Personalize Page

Employee [redacted] Empl ID [redacted] Empl Record 0

Benefit Status ⓘ

Benefit Record Number 0

Effective Date 01/25/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

Current ☐

*Benefits System Benefits Administration

Annual Benefits Base Rate USD

Benefits Employee Status Active

ACA Eligibility Details

Go To Row

Benefits Administration Eligibility ⓘ

BAS Group ID

Elig Fld 1

Elig Fld 4

Elig Fld 7

Elig Fld 2

Elig Fld 5

Elig Fld 8

Elig Fld 3

Elig Fld 6

Elig Fld 9

Benefit Program Participation Details ⓘ

*Effective Date 01/25/2021

Currency Code USD

*Benefit Program PSX

Sys delivered empty Ben Pgm

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Update/Display

Include History

For further information on eligibility configuration, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields** and the **Configuration Workbook**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.

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Hiring or Rehiring an Employee (continued)

Citizenship/Passport

[New Window](#) | [Help](#) | [Personalize Page](#)

Citizenship/Passport

Person ID [REDACTED]

Citizenship/Passport ⓘ

*Country

USA ⓘ

United States

Citizenship Status

Native ▼

Go To Row

+

-

Passport Information ⓘ

*Passport Number

+

-

Issue Date

📅

Expiration Date

📅

Country

USA ⓘ

United States

🔍



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. What information must be entered on the Personal Data for the new Employee
 - a) SSN, birth date, name, business email address
 - b) Position and Job information
 - c) Compensation



2. What information must be entered on the Job Data for the new Employee
 - a) SSN, birth date, name, business address
 - b) Position, Job information, Compensation
 - c) Payroll Paysheet



DEMO



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Maintain Leave Status (Unpaid)

The Enter and Maintain Leave Status business process is used to place employees in a paid or unpaid leave status.

Outside the Cardinal system, the HR Office examines the change in leave status and works with the employee to complete the appropriate documentation.

The HR Office completes the following in Cardinal to document a Leave of Absence (Unpaid):

- Change the employee's status in the Cardinal system to Leave of Absence (Unpaid)
- Extend the employee's expected return date
- Return the employee from leave

If the employee is responsible for the entire benefit cost during the LOA, update the **Elig Config 9** field to "TP-GB".



Maintain Leave Status (continued)

Leave of Absence (Unpaid)

[New Window](#) | [Help](#) | [Personalize Page](#)

Work Location | Job Information | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted]
Empl Record: 0

Work Location Details ? 1 of 3

*Effective Date: 01/27/2021

Effective Sequence: 0

HR Status: Active

Payroll Status: Leave of Absence

*Job Indicator: Primary Job

Position Number: A010000P TLC 047001000 Part Time Pos

Position Entry Date: 01/26/2021

Action: Leave of Absence - Unpaid
Reason: Non-FMLA Parental Leave

Go To Row + -

Override Position Data

Return from Leave

[New Window](#) | [Help](#) | [Personalize Page](#)

Work Location | Job Information | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted]
Empl Record: 0

Work Location Details ? 1 of 4

*Effective Date: 01/28/2021

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

*Job Indicator: Primary Job

Position Number: A010000P TLC 047001000 Part Time Pos

Action: Return from Leave
Reason: Return From Leave

Go To Row + -

Override Position Data



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. The Local HR Office is required to insert a row on the Job Record to place an employee on a Leave of Absence.
 - a) True
 - b) False



1. The Local HR Office is required to insert a row to return an employee from a Leave of Absence.
 - a) True
 - b) False



DEMO



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Separate Employee

Types of Separations covered in this section of the course:

Involuntary Termination

- Layoff
- Standards of Conduct
- Unsatisfactory Performance during Probationary Period
- Inability to Perform Duties.

Voluntary Termination

- Resignation
- Retirement: Service Retirement, Retirement In Lieu of Layoff, or Enhanced Retirement
- Separation: Completion of Limited Appointment or Contract
- Death of Employee

Voluntary and Involuntary separations are keyed to inactivate the employee record. Action/Action Reasons are used to reflect the type of separation.

After the Termination transaction is saved, the Benefits status is updated appropriately, and COBRA eligibility is triggered if applicable.



Separate Employee

Navigation: Navigator > Workforce Administration > Job Information

The Effective date of all termination transactions in Cardinal must be the date after the last day worked.

Example: If the employee last worked on a Friday, the termination effective date is Saturday, as it is the date immediately following the last day worked.

For further information on Separating Employees, refer to the Job Aid titled **HR351 Separation Statues**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.

For further information on the Layoff Process, refer to the Job Aid titled **HR351 Managing the Layoff Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.



Separate Employee (continued)

The Effective Date of all termination transactions in Cardinal must be the date immediately following the last day worked.

Work Location | Job Information | Payroll | Salary Plan | Compensation

Empl ID [REDACTED]
Employee [REDACTED] Empl Record 0

Work Location Details ?

*Effective Date 01/30/2021 [Calendar Icon]

Effective Sequence 0

HR Status Inactive

Payroll Status Terminated

*Action Termination [Dropdown]

Reason Resign Family Reasons [Dropdown]

*Job Indicator Primary Job [Dropdown]

Go To Row + -

Position Number A010000P [Search Icon] TLC 047001000 Part Time Pos

Override Position Data

Position Entry Date 01/26/2021 [Calendar Icon]

☐ Position Management Record

Regulatory Region USA United States

Company A01 Lee County - DSS

Business Unit LOCAL The Local Choice Participants

Department 047001000 Lee County - DSS

Department Entry Date 01/25/2021

Location OHB DHRM Office of Health Benefits

Establishment ID LOCAL [Search Icon] Localities

Date Created 02/01/2021

Last Start Date 01/25/2021 [Calendar Icon]

Expected Job End Date [Calendar Icon]

Termination Date 01/29/2021 [Calendar Icon]

☐ Override Last Date Worked

Last Date Worked 01/29/2021 [Calendar Icon]

STD Claim Number [Text Box]

Layoff Notice Date [Calendar Icon]

☐ Recall Eligibility Flag

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Save | Return to Search | Notify | Refresh | Update/Display | Include History

Work Location | Job Information | Payroll | Salary Plan | Compensation



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. Examples of Involuntary Termination include Standards of Conduct, Unsatisfactory Performance during Probationary Period, and Inability to Perform Duties.
 - a) True
 - b) False



2. Examples of Voluntary Termination include Resignation, Retirement, and Death.
 - a) True
 - b) False



3. The effective date of a termination is the day after the last day worked.
 - a) True
 - b) False



DEMO



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Summary

3

Setup and Maintain Employee HR Data

In this lesson, you learned:

- How to Hire/Rehire employee
- How to maintain employee leave status
- How to separate an employee



Course Summary

HR352

HCM Cardinal Employee Data Setup and Maintenance

In this course, you learned:

- There is a relationship between position, job data, personal data, and job record
- How to hire an employee online
- What steps must be completed by the HR Office to manage benefits



Course Evaluation

Congratulations! You successfully completed the HR352: HCM Cardinal Employee Data Setup and Maintenance

Your instructor will provide instructions on how to access the evaluation survey for this course.







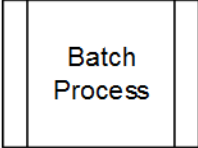
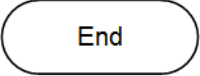
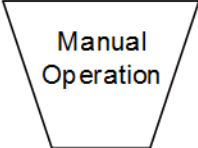
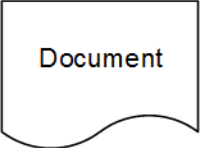
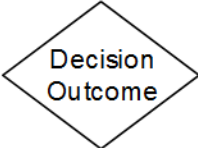
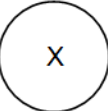
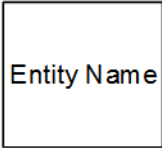
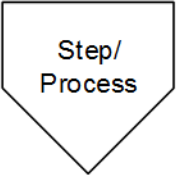
Appendix

Process Flowchart Key

Hire/Rehire Process Flow



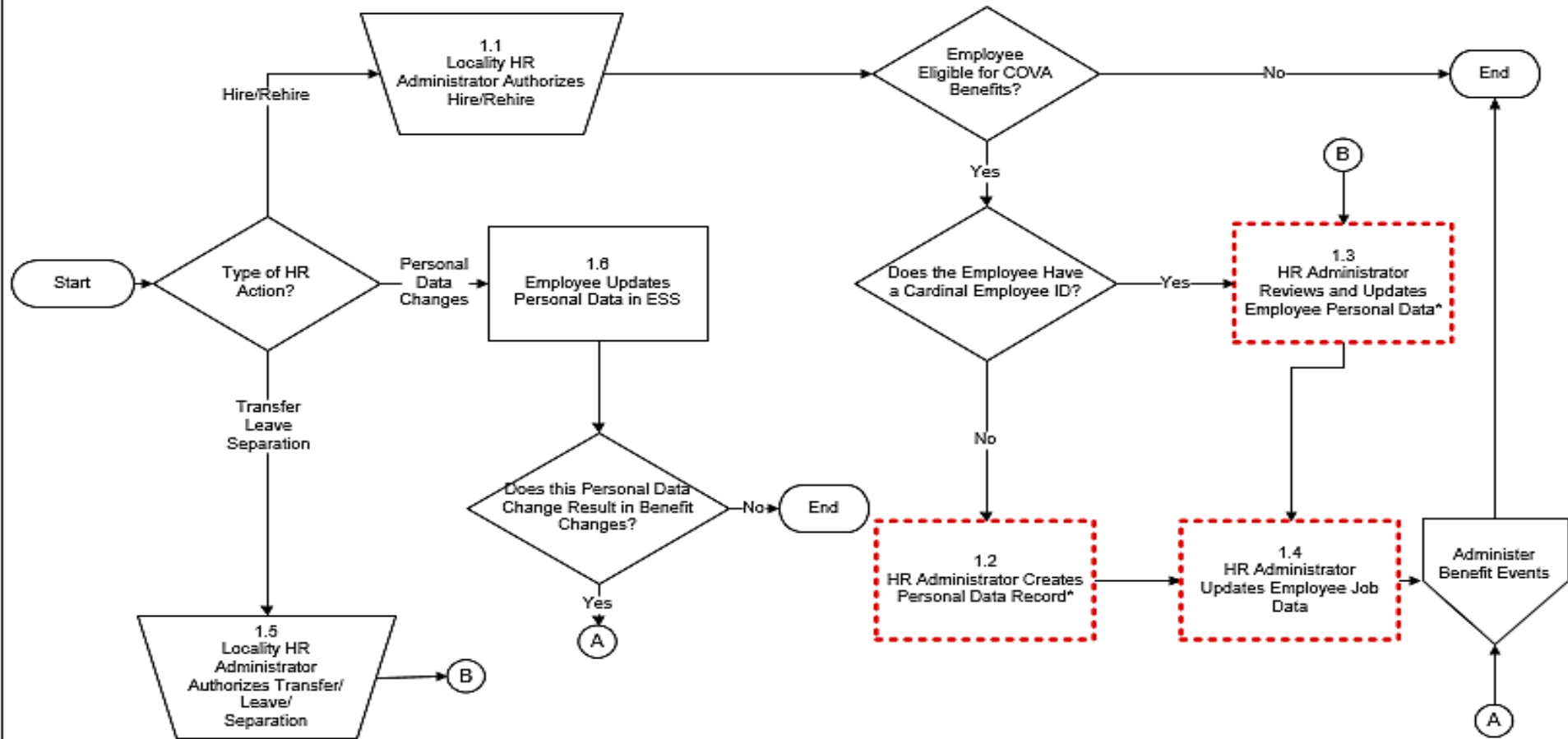
Flowchart Key

	Depicts a process step or interface.		Indicates point at which the process begins. Does not represent any activity.
	Specifies a batch process.		Indicates point at which the process ends. Does not represent any activity.
	Depicts a process step that is preformed manually.		Depicts a document of any kind, either electronic or hard copy.
	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.		Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
	Represents an entity (person, organization, etc.).		Connects steps between business processes.



Hire/Rehire

1.0 HR Process Flow - Localities



*Requires centralized localities submit documentation to OHB to initiate the action



Steps in dash outline boxes are completed by OHB for centralized localities and by locality staff for decentralized localities